

CHANGE REQUEST COVER SHEET

Change Request Number: 12-52

Date Received: 4/23/2012

Title: Assignment of Contracting Officer's Representative (COR)

Name: Eugene Scott

Phone: 202-493-4639

Policy OR Guidance: Guidance

Section/Text Location Affected: T3.10.1A(3)

Summary of Change: The changes are made to (i) change the term Contracting Officer's Technical Representative (COTR) to Contracting Officer's Representative (COR) in accordance with new guidance from the Federal Acquisition Institute and (ii) to revise the specified amount of training specified in paragraph 3(b) from 40 hours to the training requirements specified in the COR certification program. In addition to the attached changes, all references to COTR in AMS will be changed to COR.

Reason for Change: This Guidance change is in response to the changes that were made by the Federal Acquisition Institute to COR certification policy.

Development, Review, and/or Concurrence: Acquisition Career Management office, Acquisition Policy, AGC-500, Aeronautical Center contracting and the COR Tiger Team.

Target Audience: CORs and COs.

Potential Links within FAST for the Change: none

Briefing Planned: No

ASAG Responsibilities: Approve

Potential Links within FAST for the Change: none

Links for New/Modified Forms (or) Documents (LINK 1) [none](#)

Links for New/Modified Forms (or) Documents (LINK 2)

Links for New/Modified Forms (or) Documents (LINK 3)

SECTIONS EDITED:

Procurement Guidance:

T3.10.1 Contract Administration

Contract Administration

Section 3 : Assignment of Contracting Officer's Representative [\[Old Content\]](#)[\[New Content\]](#) [\[RedLine Content\]](#)

SECTIONS EDITED:

Section 3 : Assignment of Contracting Officer's Technical Representative

Old Content: Procurement Guidance:

T3.10.1 Contract Administration

Contract Administration

Section 3 : Assignment of Contracting Officer's Technical Representative

a. *Designating a Contracting Officer's Technical Representative (COTR).* The CO may designate an individual to act as his/her technical representative to facilitate contract administration. A COTR resolves technical issues, gives technical direction to the contractor, and interprets technical processes and procedures for the CO. Other functions include interpreting technical requirements; assisting with the acquisition strategy; assisting development of the statement of work; generating government cost estimates; assisting in the negotiation of costs or price of technical requirements; monitoring contractor performance; reviewing and accepting services, supplies, and equipment; reconciling invoices and recommending payments. Requiring organizations should ensure that the person recommended as COTR has qualifications and expertise appropriate for the nature of the contract and duties to be delegated. The CO appoints a technical representative by written memorandum describing specific delegated authority and responsibilities. The memorandum is provided by the CO to the COTR at the time the assignment is made or changed in any way. See the Appendix to this Guidance for a sample delegation memorandum. Also see AMS COTR Handbook for additional information about COTR duties.

b. *Basic Training and Biennial Refresher Training Requirements.* See AMS Policy Section 5, Acquisition Career Program, for complete training requirements.

(1) The designated COTR must meet the initial training requirement for certification by completing 40 hours of COTR training. Training will be completed prior to appointment. Training may be completed online or in a classroom. Information regarding online and classroom training providers can be obtained from the Leadership and Professional Development Office (AJG).

(2) The COTR must provide documentation showing completion of basic and biennial refresher training to the CO.

c. *Authority of the Technical Representative.* A duly-assigned COTR is authorized to perform the actions delegated by the CO in a memorandum of delegation. When determining the support needed from a technical representative, the CO should consider the specific requirements and

needs of the contract and clearly specify the authority that he/she is granting to the technical representative in a written memorandum of delegation. One memorandum of delegation for all situations may not be appropriate because contractual situations are distinct and have varying needs. The sample delegation memorandum in the Appendix to this Guidance may be modified to reflect the specific needs of the contract and CO. Depending on the scope, duration, complexity and aggregate total of the contract, a COTR may not be required.

d. *Changing the Technical Representative.* To change the technical representative on a contract, the CO must revoke the previous delegation and issue a succeeding delegation to another representative. Both of these memoranda are in writing and issued concurrently. The CO must forward copies of COTR changes to the Acquisition Career Management Team (AJA-A3), as they occur.

e. *Notifying the Contractor.* The CO furnishes copies of all delegation and revocation memoranda to the contractor so that they are aware of the technical representative and his or her authority and responsibilities.

New Content: Procurement Guidance:

T3.10.1 Contract Administration

Contract Administration

Section 3 : Assignment of Contracting Officer's Representative

a. Designating a Contracting Officer's Representative (COR). The CO may designate an individual to act as his/her representative to facilitate contract administration. A COR resolves technical issues, gives technical direction to the contractor, and interprets technical processes and procedures for the CO. Other functions include interpreting technical requirements; assisting with the acquisition strategy; assisting with or developing the statement of work; preparing Government cost estimates; assisting in negotiation of costs or price of technical requirements; monitoring contractor performance; reviewing and accepting services, supplies, and equipment; reconciling invoices and recommending payments. Requiring organizations should ensure that the person recommended as COR has qualifications and expertise appropriate for the nature of the contract and duties to be delegated. The CO appoints a representative by written memorandum describing specific delegated authority and responsibilities. The memorandum is provided by the CO to the COR at the time the assignment is made or changed in any way. See the Appendix to this Guidance for a sample delegation memorandum. Also see AMS COR Handbook for additional information about COR duties.

b. Basic Training and Biennial Refresher Training Requirements. See AMS Policy Section 5, Acquisition Career Program, for complete training requirements.

(1) The designated COR must meet the initial training requirement for certification by completing the designated hours of COR training. The required training is established as a three level certification program. Training and certification for Levels I and II will be completed prior to appointment. Level III certification must be completed no later than six months after appointment. Training may be completed online or in a

classroom. Information regarding online and classroom training providers can be obtained from the Acquisition Career Management Office (AAP-300).

(2) The COR must provide documentation showing certification or a waiver to the CO.

c. Authority of the Contracting Officer's Representative. A duly-assigned COR is authorized to perform the actions delegated by the CO in a memorandum of delegation. When determining the support needed from a representative, the CO should consider the specific requirements and needs of the contract and clearly specify the authority that he/she is granting to the representative in a written memorandum of delegation. One memorandum of delegation for all situations may not be appropriate because contractual situations are distinct and have varying needs. The sample delegation memorandum in the Appendix to this Guidance may be modified to reflect the specific needs of the contract and CO. Depending on the scope, duration, complexity and aggregate total of the contract, a COR may not be required.

d. Changing the Contracting Officer's Representative. To change the representative on a contract, the CO must revoke the previous delegation and issue a succeeding delegation to another representative. Both of these memoranda are in writing and issued concurrently. The CO must forward copies of COR changes to the Acquisition Career Management Team (AAP-300), as they occur.

e. Notifying the Contractor. The CO furnishes copies of all delegation and revocation memoranda to the contractor so that they are aware of the representative and his or her authority and responsibilities.

Red Line Content: Procurement Guidance:

T3.10.1 Contract Administration

Contract Administration

Section 3 : Assignment of Contracting Officer's ~~Technical~~ Representative

a. Designating a Contracting Officer's ~~Technical~~ Representative (~~COTR~~COR).- The CO may designate an individual to act as his/her ~~technical~~ representative to facilitate contract administration. A ~~COTR~~COR resolves technical issues, gives technical direction to the contractor, and interprets technical processes and procedures for the CO.- Other functions include interpreting technical requirements; assisting with the acquisition strategy; assisting ~~development~~*with or of*~~developing~~ the statement of work; ~~generating~~*preparing* ~~government~~*Government* cost estimates; assisting in ~~the~~ negotiation of costs or price of technical requirements; monitoring contractor performance; reviewing and accepting services, supplies, and equipment; reconciling invoices and recommending payments. - Requiring- organizations should ensure- that the person recommended as ~~COTR~~COR has qualifications and expertise appropriate for the nature of the contract and duties- to be delegated. The CO appoints a ~~technical~~ representative by written memorandum describing specific delegated authority and responsibilities. The memorandum is provided by the CO to the ~~COTR~~COR at the time the assignment is made or changed in any way. See the Appendix- to this Guidance- for- a sample delegation memorandum. - Also see AMS ~~COTR~~COR Handbook for additional information about ~~COTR~~COR duties.-

b. Basic Training and Biennial Refresher- Training Requirements.- See AMS Policy Section-5, Acquisition Career Program, for complete training requirements.

(1) The designated ~~CO~~TRCOR must meet the initial training requirement for certification by completing ~~40~~the designated hours of ~~CO~~TRCOR training. The required training is established as a three level certification program. Training and certification for Levels I and II will be completed prior to appointment. Level III certification must be completed no later than six months after appointment. Training may be completed online or in a classroom. Information regarding online and classroom training providers can be obtained from the ~~Leadership and~~Acquisition Professional Development~~Career Management~~ Office (~~AJG~~AAP-300).

(2) - The ~~CO~~TRCOR must provide documentation showing ~~completion of basic and certification~~ biennial refresher training or a waiver to the CO.-

c. Authority of the ~~Technical Contracting Representative Officer~~ ~~�~~ s Representative. A duly-assigned ~~CO~~TRCOR is authorized to perform the actions delegated by the CO in a memorandum of delegation. When determining the support needed from a ~~technical~~ representative, the CO should consider the specific requirements and needs of the contract- and clearly specify the authority that he/she is granting to the ~~technical~~ representative in a written memorandum of delegation. One memorandum of delegation for all situations may not be appropriate because contractual situations are distinct and have varying needs. The sample delegation memorandum in the Appendix to this Guidance may be modified to reflect the specific needs of the contract and CO. Depending on the scope, duration, complexity and aggregate total of the contract, a ~~CO~~TRCOR may not be required.

d. Changing the ~~Technical C on tracti n g Officer's~~ Representative. To change the ~~technical~~ representative on a contract, the CO must revoke the previous delegation and issue a succeeding delegation to another representative. Both of these memoranda- are in writing and issued concurrently. The CO must forward copies of ~~CO~~TRCOR changes to the Acquisition Career Management Team (~~AJ~~AAP-A3300), as they occur.-

e. Notifying the Contractor. The CO furnishes copies of all delegation and- revocation memoranda to the contractor so that they are aware of the ~~technical~~ representative and his or her authority and responsibilities.